Standard Competitions

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Standard Competitions

Intended Audience:

- Individuals who will oversee, manage, or conduct standard public-private competitions
- Participation requires fundamental knowledge of the purposes and processes of the competitive sourcing program
- Attendees should read Section D of Attachment B of OMB Circular A-76 (May 2003) and review pertinent sections of Attachment C

Standard Competitions

- Training Track Objectives:
  - Understand standard competition process
  - Understand purpose of and general approach to developing Performance Work Statement (PWS)
  - Understand purpose of and general approach to developing Agency Tender (AT)
  - Understand roles and responsibilities of key players

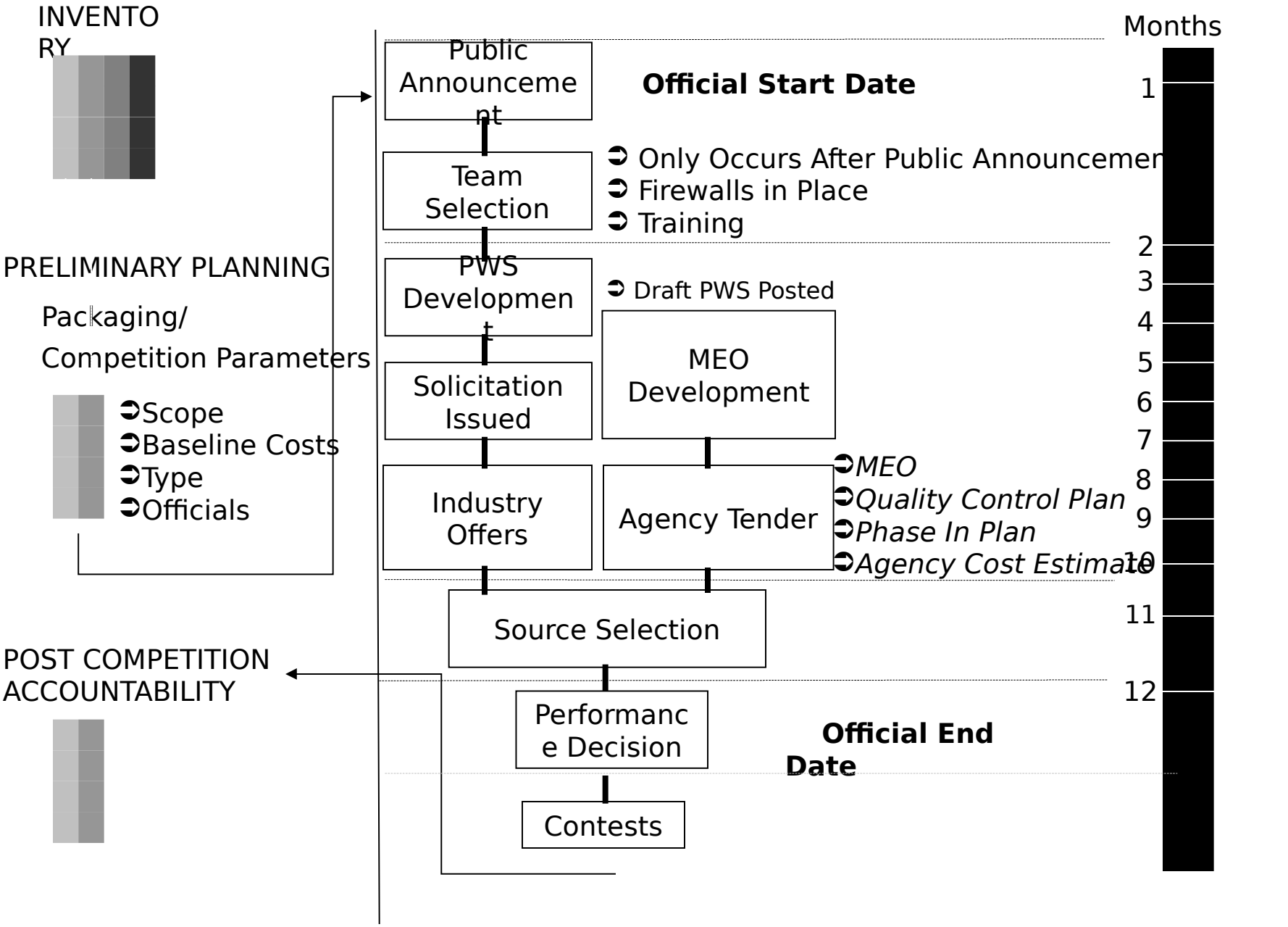
Agenda

- Terminology
- Overview of standard competition process
- Performance Work Statement Phase
- Agency Tender Phase
- Source Selection Phase
- Post Competition Phase

Terms and Acronyms

- Agency Cost Estimate (ACE)
- Agency Tender (AT)
- Agency Tender Official (ATO)
- Commercial Activity (CA)
- COMPARE
- Competition Officials
- Component Competitive Sourcing Official (CCSO)
- Contracting Officer (KO)
- Delegated Competitive Sourcing Official (DCSO)
- Government Furnished Property (GFP)
- Human Resource Advisor (HRA)
- Inherently Governmental (IG)
- Low Price Technically Acceptable (LPTA)
- MEO Letter of Obligation
- Performance Decision (PD)
- Phase-in Plan
- Private Sector (PS)
- Public Announcement (PA)
- Public Reimbursable Source (PR)
- Service Provider (SP)
- Source Selection Authority (SSA)
- Standard Competition Form (SCF)
- Streamlined Competition Form (SLCF)

STANDARD COMPETITION PROC



Public Announcement

- **Start Date** for any competition (streamlined or standard)
- Occurs at local level
- Published in **FedBizOpps**

- **Performance Decision** is **End Date** for any competition (streamlined or standard)
- Performance decision announcement occurs at local level and published in **FedBizOpps**

Public Announcement
Team Selection
Action Plan
PWS
- Structure
- Performance

Based
- Data Collection
- Analysis

QASP
Acquisition
Agency Tender
- *MEO*
- *Quality Control Plan*
- *Agency Cost Estimate*
- *Phase In Plan*

Performance Decision
Contests

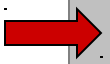
Team Selection

- Competition officials appointed during preliminary planning
- Team assignments made after public announcement

PWS Team

MEO Team

SSEB



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Performance Decision
Contests

Teams

PWS

- Comprised of technical and functional experts
- Develop PWS, QASP, workload data, and other as required
- Determine GFP – written determination
- Assist KO in developing solicitation
- "Directly affected personnel" may be on team
- **Cannot participate on MEO Team**

Firewall

- ATO appoints
- Comprised of technical and functional experts
- Supported by HRA, advisors, and consultants
- ATO makes all final management decisions
- **Cannot participate on PWS or SSEB teams**

Firewall

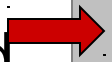
SSEB

- SSA appoints
- Comply with FAR in selection process
- Directly affected personnel may not participate
- **MEO team members and anyone with knowledge of agency tender may not participate**

Competition Officials appointed during preliminary planning. Teams appointed after public announcement.

Action Plan

- Milestones, documents to be produced, & required resource estimates
- Information to be gathered
- Data gathering / analytical methodologies
- Team member roles and responsibilities
- Communication plan
- Issue resolution approach
- Training



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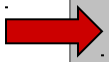
Performance
Decision
Contests

PWS Purpose

- Identifies services to be performed (outputs)
- Provides performance requirements of each output
- Scope of work for agency tender and industry proposals
- Basis of costs entered on SCF



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Performance Decision
Contests

Practical Understanding

You Would Need To Know

- *What types of services are required*
- *What amount of work*
- *Under what constraints would work be performed*
- *What standards of performance are required*

Because You Would Need To

- *Assess magnitude and scope of work*
- *Assemble effective approach*
- *Determine resources required*
- *Provide cost estimate*

The Solicitation

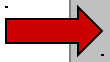
- Formal acquisition document
- Contains contract & submission instructions
- PWS is Section C

Uniform Contract Format (FAR 15.204-1)

- A *Solicitation/Contract Form*
- B *Supplies or Services Prices and Costs*
- C *Description/Specifications Work Statement*
- D *Packaging and Marking*
- E *Inspection and Acceptance*
- F *Deliveries or Performance*
- G *Contract Admin Data*
- H *Special Contract Requirements*
- I *Contract Clauses*
- J *List of Attachments*
- K *Reps, Certs, Etc*
- L *Instructions, Conditions, and Notices*
- M *Evaluation Factors*

- **General Requirements**
- **Definitions/Acronyms**
- **Government Furnished**
- **Specific Tasks/Services**
- **Publications/Forms**
- **Technical Exhibits**

PWS Format



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C-1: General Requirements

- Provides overview of PWS
- Defines scope of products and services to be provided
- Defines service provider conditions of performance
- Typically includes some “deliverables” indirectly associated with services. E.G., safety plan, key control plan

1.0 GENERAL REQUIREMENTS. .....
1.1 OBJECTIVE. .....
1.2 SCOPE. .....
1.3 PHASE-IN PLAN AND PHASE-IN. .....
1.4 PERSONNEL GENERAL. .....
1.4.1 General Qualifications. .....
1.4.2 Project Management. .....
1.4.3 Employee Conduct. .....
1.5 DATA AND INFORMATION. .....
1.6 MEDIA. .....
1.7 WORKLOAD. .....
1.8 HOURS OF OPERATION. C1-2

C-2: Definitions and Acronyms

Definitions

Establish clear, contractual meaning of unique or organization-specific terms

Acronyms

Provide ease of reference for frequently used acronyms

C-3: Government Furnished

Agency Items Provided for Use by All Service Provider

(FAR Part 45)

- Facilities
- Equipment
- Materials & Supplies
- Services (e.g., telephone, custodial)

3.0 GENERAL. .....

3.1 FACILITIES. .....
- **3.1.1** Initial Facilities/Equipment Inspection. .....
- **3.1.2** Final Facilities/Equipment Inspection. .....

3.2 SERVICES/EQUIPMENT. .....
- **3.2.1** Travel. .....
- **3.2.2** Database. .....
- **3.2.3** Utilities. .....
- **3.2.4** Office Equipment. .....
- **3.2.5** Local Area Network. .....
- **3.2.6** Custodial and Trash Removal. .....
- **3.2.7** Pavement Maintenance. .....
- **3.2.8** Hazardous Material and Waste Disposal. .....
- **3.2.9** Consumable Supplies/Materials. .....
- **3.2.10** Phase IV Supplies. .....
- **3.2.11** Security Clearance. .....
- ***3.2.12** Background Checks.* *C3-2*

C-4: Service Provider Furnished

Items/services all Service Providers required to furnish

4.0 GENERAL. .....
4.1 EQUIPMENT. .....
4.2 EMPLOYEE BADGES. .....
4.3 Removal of Equipment. C4-1

C-5: Specific Tasks/Services

- Main section of PWS
- Service requirements
- Performance standards
- Conditions of performance
- Projected workload

5.0 GENERAL. .....
5.1 OPERATIONS MANAGEMENT. .....
5.1.1 Shore and Afloat Services. .....
5.2 ENVIRONMENTAL, SAFETY, AND HEALTH MANAGEMENT. .....
5.2.1 Environmental Protection and Hazardous Material Control. .....
5.2.2 Safety Management. .....
5.3 EMERGENCY RESPONSE. .....
5.3.1 Emergency Response and Actions. .....
5.4 PHYSICAL SECURITY PLAN. .....
5.4.1 Off-shore Security. .....
5.4.2 On-shore Security. .....
5.4.3 Key Control. .....
5.5 FINANCIAL ADMINISTRATION. .....
5.6 Grounds Maintenance. C5-9

C-6: Pubs/Forms

- Mandatory
- Advisory

Technical Exhibits

- Workload
- Maps/work area layouts
- Systems descriptions
- Technical descriptions
- Reports, inspections, customer agreements

Performance Based Service Acquisition

Acquiring services by communicating desired end results (outputs/outcomes) instead of requiring detailed processes

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Performance Based Acquisition

Benefit	Rationale
Innovative Solutions	Processes are not mandated and therefore allow for innovative approaches where the latest technology and practices can be utilized.
Reduced Risks	Inherent risks associated with prescribed work methods are reduced. In prescribed processes, the smallest fault of the Government providing inputs to the processes often result in additional costs or even work stoppage.
Increased Quality	Since the outputs are the requirements, the focus is on the quality of outputs instead of the processes or other non-value added requirements associated with the producing the output.
Technology Optimized	Terms are flexible enough to allow for the implementation of new/updated procedures as emerging levels of technological advances become available without the capital expenditures that would otherwise be required to update the technology base.

Getting Started

Identify Needed PWS Data

- Activity data
- Requirements data
- Output data
- Workload data
- Performance data
- Resource data
- Organizational unique data

Assess Condition Of Existing Data

- Reliability
- Usefulness
- Timeliness
- Accessibilit y

Develop Data Collection Methodology

- What tools/techniques will be used?
- Where will the data come from?
- How long will it take to receive requested data?
- What data is needed first?
- What areas require more emphasis/detail?

Tools and Techniques

- Work Breakdown Structure (WBS)
- Employee/personal interviews
- Data collection forms
- Activity forms
- Data calls/surveys
- Workshops

WBS

- Serves as the Outline for the PWS
- Organizes data by functions, activities, tasks, and steps
- Suggested starting point in data collection/analysis

Employee Interviews

- Employees often best data source
- Uncovers information not documented
- Key objectives:
  - Collect facts on work being done
  - Obtain knowledge of processes
  - Obtain activity information/data

Data Collection Forms

- Comprehensive form used during interviews to capture all data
- Provides traceability to data obtained
- Can detail every aspect of each activity an employee performs

Activity Forms

- Comprehensive form used in job analysis phase
- Convenient way to organize and maintain activity data

Input	Activity	Output	Workload	Performance Indicator	Performance Standard	APL

Data Calls/Surveys

- Convenient for capturing extensive data
- Especially useful in workload and resource data gathering

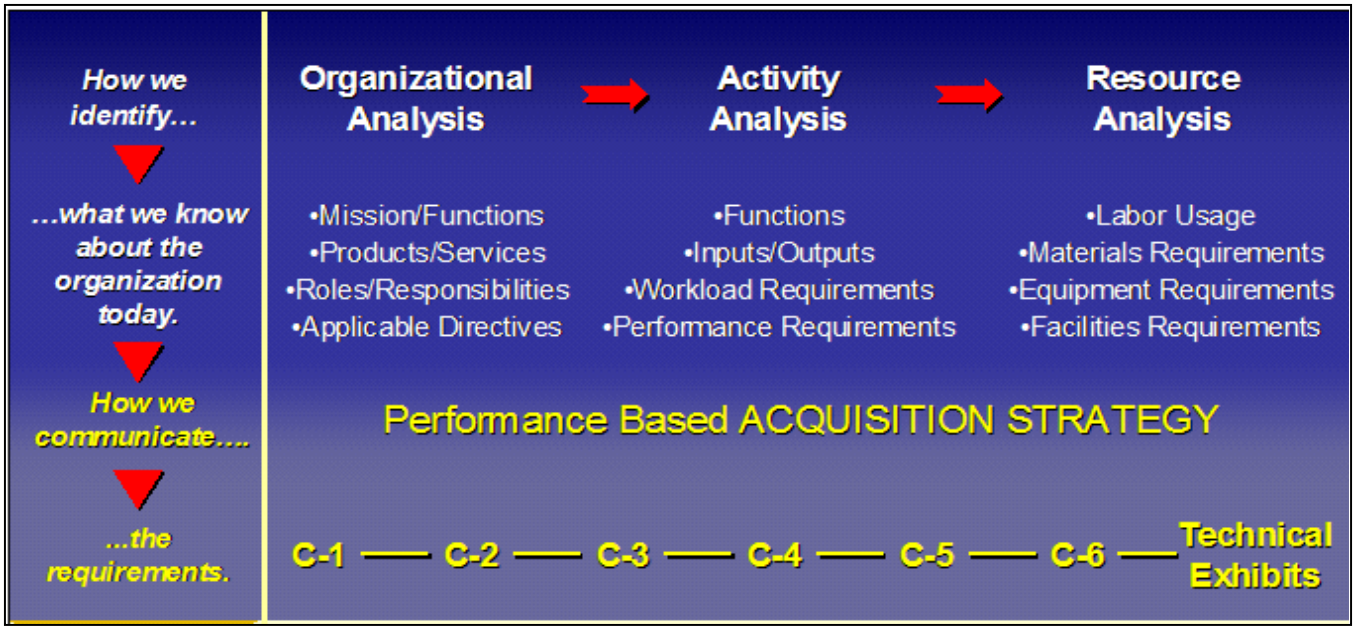
Workshops

- Excellent way to achieve group consensus
- Useful for management, functional experts, and employees

Data Sources

- Directives/policies/regulations/sops
- Historical records/data bases
- Service level agreements
- Industry standards
- Supervisors
- Employees
- Operational audits

PWS Analyses



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- **Post Competition Accountability**

Organizational Analysis

Task 1: **Determine Mission (Current Organization)**

Data Needed

- Mission statement
- Products & services
- Customers supported
- Organization structure

Tool/Technique Mix

- Directives analysis
- Workshops
  - Management
  - Functional experts

Task 2: **Determine Functions (Current Organization)**

Data Needed

- Functions required to support mission

Tool/Technique Mix

- Directives analysis
- Workshops
  - Management
  - Functional experts

Activity Analysis

Task 1: Identify Activities, Tasks, Steps of Defined Functions

Data Needed

For each function:
- Activities performed
  - Tasks required
    - Steps taken

Tool/Technique Mix

- WBS development
- Workshops
  - Functional experts
  - Employees
- Personal interviews

Task 2: Identify Inputs/Outputs

Data Needed

- Inputs to each activity
- Outputs of each activity

Tool/Technique Mix

- Activity forms
- Personal interviews
- Workshops

Activity Analysis

***Task 3:* Identify Current Workload (based upon defined outputs)**

Data Needed

Historical Workload

- Volume
- Frequency
- Duration

Tool/Technique Mix

- Records
- Data bases
- Estimates
- Personal interviews
- Data collection forms
- Data calls/surveys

***Task 4:* Project Future Workload (based upon defined outputs)**

Data Needed

- Historical workload
- Known changes

Tool/Technique Mix

Requires extensive analysis of team members, functional experts, and management

Activity Analysis

Task 5: Define Performance Requirements

Data Needed

- Output requirements (standards)
  - Timeliness
  - Quality
- Performance indicators
- Acceptable performance levels

Tool/Technique Mix

- Directives
- Management interviews

Task 6: Determine Performance Measures

- Workload to cost ratios
- Transaction ratios
- Error rates
- Consumption rates
- Turnaround time
- Customer satisfaction

Activity Analysis

ACTIVITY FORM

Input	Activity	Output	Workload	Performance Indicator	Performance Standard	APL
Phone call	Respond to phone calls	Answer to phone inquiry	250 calls per month	Response accuracy and timeliness	Provide correct response within 1 working day 95% of the time and never beyond 3 working days	95% Accuracy 95% Timeliness Based total number of calls per month

Resource Analysis

Determine Required Resources

Data Needed

- Labor
- Materials
- Equipment
- Facilities

Tool/Technique Mix

- Records/equipment listings
- Personal interviews
- Data calls/surveys

Develop Work Statements

Work statements include:

- Work descriptions by function/activity (Service Provider “shall”; Government “will”)
- Outputs
- Performance Indicators/Standards/APL
- Workload

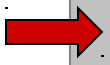
QASP

Purpose

- Details government's plan for monitoring service provider performance (surveillance)
- Defined performance standards basis of Quality Assurance Surveillance Plan (QASP)
- Start with Performance Requirements Summary (PRS) and add other information as required in guidance (e.g., methods of surveillance)

What is Surveillance?

- Evaluate service provider performance IAW QASP
- Performed by Quality Assurance Evaluator (QAE)
- Applies to MEO and contractor



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Performance Decision
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Developing the QASP

Step 1: Determine Scope

- Which essential outputs should be evaluated?
- What is the duration of the surveillance periods?
- Are there enough evaluators to perform the magnitude of proposed surveillance scope?

Step 2: Identify Information Sources

- Customer complaint system
- Customer satisfaction surveys
- System data (e.g., response time, completion time, quality reports, usage reports, resource allocation, etc.)

Developing the QASP

Step 3: Develop Assessment Methods

- Random sampling
- Trend analysis
- Periodic sampling
- Third party audits
- Customer surveys

QASP Outline

- QASP intent
- Roles and responsibilities
- Surveillance procedures
- Assessment methods
- Sample of contract deficiency report
- Customer complaint procedures and training instructions

Agency Tender

MEO

- Agency staffing plan
- Organization chart
- Position descriptions
- Subcontract, materials, equipment, facility details

Agency Cost Estimate

- Represents agency's cost proposal
- Developed and certified by ATO

Quality Control Plan

- MEO self inspection plan
- Describes internal staffing
- MEO service delivery procedures

Phase In Plan

- MEO replacement plan of current SP
- Details to minimize disruption, personnel impacts, startup costs

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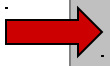
Post Competition Accountability

MEO Purpose

The MEO is an efficient and effective Government organization that competes with industry in the A-76 competition.

The MEO:

- Represents Government's proposed organization to meet solicitation requirements
- Identifies process/organizational improvements
- Defines structure and staffing of new/competitive organization
- Serves as Agency Cost Estimate Basis



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MEO and Solicitation

Uniform Contract Format

A ***Solicitation/Contract Form***

B ***Supplies or Services Prices and Costs***

C ***Description/Specifications Work Statement***

D ***Packaging and Marking***

E ***Inspection and Acceptance***

F ***Deliveries or Performance***

G ***Contract Admin Data***

H ***Special Contract Requirements***

I ***Contract Clauses***

J ***List of Attachments***

K ***Reps, Certs, Etc***

MEO Development Process

- Plan the study
- Collect data
- Analyze organization / operations (ID improvements)
- Prepare results/recommendations
- Decide on what to change
- Prepare documentation

Getting Started

- Review and Understand the Solicitation and PWS
- MEO must respond to the PWS requirements
  - Basis for developing the MEO
  - Understand Performance Requirements
- Address GFP/Services
- Review Workload Requirements
- Resolve Questions/Issues with KO

MEO Data Required

- Time required to performs tasks
- Process flow of work performed
- Organizational layouts
- Inputs/outputs of work
- Activity cost drivers
- Market research

Collecting MEO Data

- Interviews
- Historical data
- Observations
- Questionnaires
- Surveys
- Focus groups

Overview of MEO Tools/Techniques

Time Study (Quantitative)

Work Sampling (Quantitative)

Operational Audit (Quantitative)

Quantitative: Productive Man-hours

Layout Charting (Qualitative)

Work Distribution Charting (Qualit

Process Mapping (Qualitative)

Qualitative: Process Improvements

Control Charting (Analysis)

Scatter Diagrams (Analysis)

Ratio Analysis (Analysis)

Analysis: Decision Making

REDUCE LABOR COSTS

Consolidate work centers

Eliminate redundancy

Minimizes overhead

Optimize workforce

Multi-skilled workers

Cross-utilize workers

Eliminate positions

Clerical / support

Non-essential

Minimize grade structure

MEO CROSSWALK

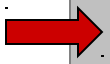
(Example)

PWS #	PWS SPECIFIC TASKS	Workload Data	Freq.	Unit Hrs	Man-Hours	FTEs
C-5.1	**CONTROL AND OPERATIONS**					
C-5.1.1	*UPDATE LAB ACCESS LIST*	Number of Updates Completed	416.00	0.333	138.53	0.078
C-5.1.2	*MAINTAIN FILES & SHIPMENTS*	Number of Files Maintained	309.00	0.200	61.80	0.035
		Number of Shipments Made	1,600.00	0.567	906.67	0.511
C-5.1.3	*SHIP PARTS*	Number of Parts Shipped	379.00	0.217	82.12	0.046
C-5.1.4	*MAINTAIN REFERENCE LIBRARY*	Number of Publications Maintained	365.00	0.250	91.25	0.051
C-5.1.5	*TOOLS CHECK OUT*	Number of Tools Controlled	4,315.00	0.067	287.67	0.162
C-5.2	**MAINTAIN WORKYEAR SYSTEM**					
C-5.2.1	*CHECK WORKYEAR DATA*	Number of Requests	739.00	0.283	209.38	0.118
C-5.2.2	*PROVIDE STATUS REPORT*	Number of Status Reports Completed	252.00	1.117	281.40	0.158
C-5.2.3	*MAINTAIN WORKYEAR DATA*	Number of Entries Made in Work Year Data System	718.00	0.383	275.23	0.155
		TOTALS			75,896.00	42.734

Quality Control Plan

Distinct Concepts

- **Quality Assurance**
  - Executes QASP
  - Interface between contracting and Service Provider (SP)
  - Common costs
- **Quality Control**
  - SP's internal quality compliance proposal
  - Addresses surveillance, feedback, and corrective action
  - Cost must be addressed by SP



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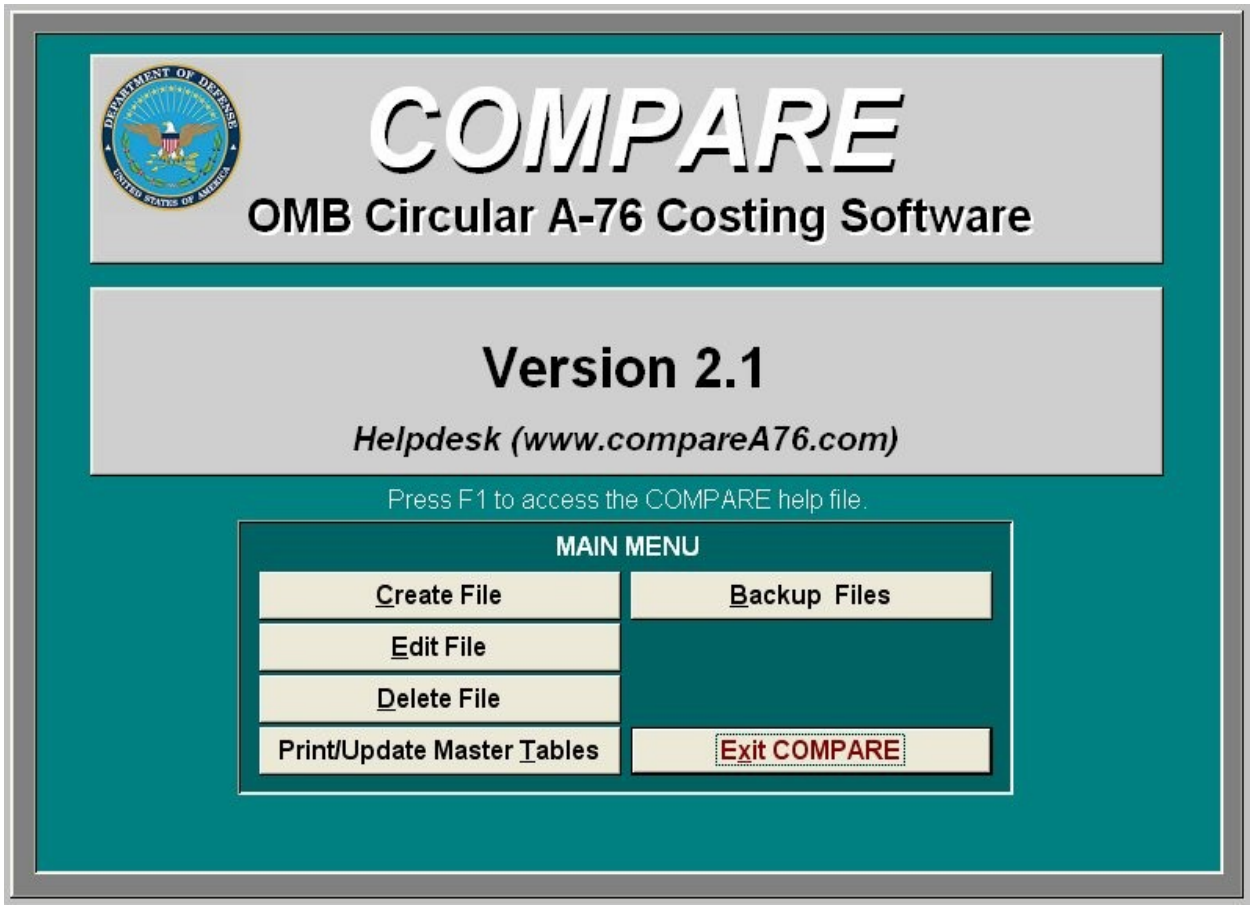
Agency Cost Estimate



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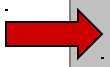
Line By Line Explanation

STANDARD COMPETITION FORM	
Line 1 Personnel **Line 2** Materials & Supplies **Line 3** Capital Assets, Minor Items, Maintenance, Rent, ME Subcontracts, Travel, Utilities, Other Costs **Line 4** Overhead **Line 5** Additional Costs **Line 6** Total Agency Costs	**Line 7** PS Price / PR Costs **Line 8** Contract Administration **Line 9** Additional Cost **Line 10** OneTime Conversion Costs **Line 11** Gain On Assets **Line 12** Federal Income Tax **Line 13** Total PS / PR Costs

Line 14 Conversion Differential
Line 15 Adjusted Total Agency Cost
Line 16 Adjusted Total PS / PR Cost
Line 17 Cost Difference Line 16 - 15

Phase-In Plan

- Plan to transition from current to proposed operation
  - Solicitation dependent
  - Follows performance decision and prior to first period of full performance
- Actions include
  - HR restructuring processes
  - Reorganization
  - Repositioning equipment
  - Training of new workforce
  - Inventories
  - Performance of solicitation requirements (key control plan, etc.)
- Costing implications
  - Labor (timing of hiring actions)
  - Situation dependent



Public Announcement
Team Selection
Action Plan
PWS
- **Structure**
- **Performance**

Based
- **Data Collection**
- **Analysis**

QASP
Acquisition
Agency Tender
- ***MEO***
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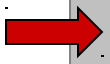
- ***Phase In Plan***

Performance Decision Contests

Source Selection Process

Four acquisition approaches:

- Sealed Bid
- Negotiated “Low Priced Technical Acceptable”
- Negotiated “Phased Evaluation Source Selection Process”
- Negotiated “Tradeoff Source Selection Process”



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Performance
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Contests

Handling Private & Public Offers

- Concurrent evaluation required
- Protect proprietary information
- Don’t require, direct, or make specific changes to any private or public offer
- Oral presentations can’t provide unfair advantage or inherent benefit to one provider over another
- Conduct exchanges IAW FAR 15.306 *except*
  - **Must deal only in writing between KO and ATO**

Material Deficiencies

- If KO perceives agency tender materially deficient, shall ensure ATO receives deficiency notice
- KO affords all offers with material deficiency specific number of days to address deficiency
- DCSO may advise the SSA to exclude the AT from standard competition if determines ATO cannot correct material deficiencies
  - **Must determine whether additional resources will remedy deficiencies**
  - **Must document reasons for exclusion**
  - **Complete performance decision without AT**

Price Analysis and Cost Realism

- KO must conduct on all offers regardless of contract type
  - Agency and PR calculated
    - IAW Attachment C
    - Based on standard factors as of PD date
    - COMPARE version as of PD date

- "Pricing" means the process of establishing reasonable amounts to be paid for supplies or services

- "Cost realism" means that costs in an offeror's proposal
    - Are realistic for the work to be performed;
    - Reflect clear understanding of requirements; and
    - Are consistent with various elements of offeror's technical proposal

- Conversion differential appropriately included

Performance Decision

- Establishes official “end date”
- Accomplished by proper signature on SCF
- Must publish decision in FedBizOpps
- Debriefing offered to PS/PR sources, ATO, and directly affected government personnel
- Release of Certified SCF and Tenders
  - Decision Contests resolved via FAR 33.103
  - Until resolution of contests or expiration of time limit to file, only legal agents for directly interested parties allowed access
  - At request and upon resolution or time expiration release certified SCF, agency tender, and PR Tender
  - Withhold private sector proprietary information from release

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Performance Decision
Contests

Contests

- Directly interested party may contest any of the following actions
  - Solicitation
  - Cancellation of solicitation
  - Determination to exclude a tender or offer
  - Termination or cancellation of contract or letter of obligation
- Resolved under FAR Subpart 33.103

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Performance Decision Contests

Implementing a Performance Decision

- *The KO shall…*
  - Private Sector
    - Award a contract
    - Comply with Right of First Refusal requirements
  - PR – Develop a fee-for-service agreement
  - Agency – Establish a MEO Letter of Obligation
    - Incorporate appropriate portions of solicitation
      - PWS/SOW
      - Reporting requirements
      - Oversight and inspection provisions
      - Other performance related requirements

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Performance Decision
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